



MARKET TRENDS

FOR WEEK ENDING FEBRUARY 2, 2018

 **PERFORMANCE**
FOODSERVICE



MARKET TRENDS

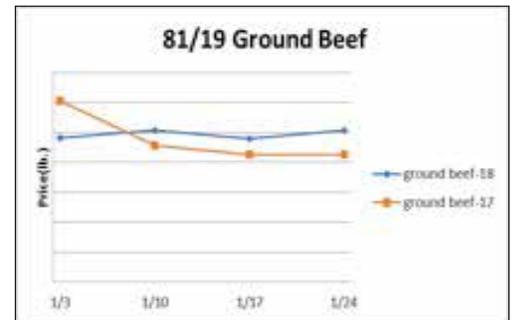
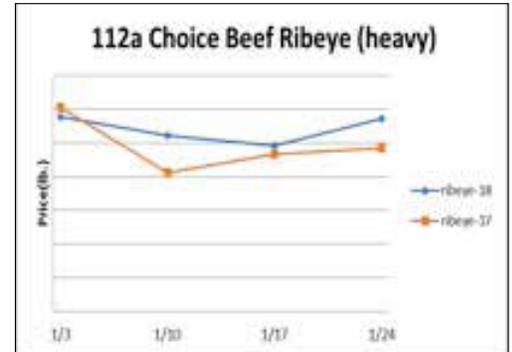
FEBRUARY 2, 2018



Beef, Veal & Lamb

Beef output last week rose .7% and was up 9.8% from the same week last year. But, winter weather challenges last year slowed slaughter operations. Beef prices have moved slightly higher in response to solid demand. Spot beef shipments last week were a five-week high. The four-week moving average for forward sales of choice, select, and grinds were 12% above last year. Packer margins have deteriorated which is slowing beef production. Still, beef output this year is running 3.7% better than 2017. The beef markets usually soften in late January. Since 2013, the average move for the USDA choice boxed beef cutout during the next three weeks was down 5.8%.

Description	Market Trend	Supplies	Price vs. Last Year
Live Cattle (Steer)	Increasing	Short	Higher
Feeder Cattle Index (CME)	Increasing	Short	Higher
Ground Beef 81/19	Increasing	Good	Higher
Ground Chuck	Decreasing	Good	Higher
109 Export Rib (ch)	Decreasing	Good	Higher
109 Export Rib (pr)	Decreasing	Good	Higher
112a Ribeye (ch)	Increasing	Good	Higher
112a Ribeye (pr)	Increasing	Good	Higher
114a Chuck , Shlder Cld(ch)	Increasing	Good	Higher
116 Chuck (sel)	Decreasing	Good	Higher
116 Chuck (ch)	Increasing	Good	Higher
116b Chuck Tender (ch)	Decreasing	Good	Higher
120 Brisket (ch)	Decreasing	Good	Higher
120a Brisket (ch)	Decreasing	Good	Higher
121c Outside Skirt (ch/sel)	Increasing	Good	Higher
121d Inside Skirt (ch/sel)	Decreasing	Good	Higher
121e Cap & Wedge	Increasing	Good	Lower
167a Knuckle, Trimmed (ch)	Increasing	Good	Lower
168 Inside Round (ch)	Increasing	Good	Higher
169 Top Round (ch)	Increasing	Good	Higher
171b Outside Round (ch)	Decreasing	Good	Higher
174 Short Loin (ch 0x1)	Increasing	Good	Higher
174 Short Loin (pr 2x3)	Increasing	Good	Higher
180 0x1 Strip (ch)	Decreasing	Good	Lower
180 0x1 Strip (pr)	Increasing	Good	Higher
184 Top Butt, boneless (ch)	Decreasing	Good	Higher
184 Top Butt, boneless (pr)	Increasing	Good	Higher
184-3 Top Butt, bnls (ch)	Increasing	Good	Higher
185a Sirloin Flap (ch)	Increasing	Good	Higher
185c Loin, Tri-Tip (ch)	Decreasing	Good	Higher
189a Tender (sel, 5 lb & up)	Increasing	Good	Higher
189a Tender (ch, 5 lb & up)	Increasing	Good	Higher
189a Tender (pr, heavy)	Decreasing	Good	Higher
193 Flank Steak (ch)	Increasing	Good	Higher
50% Trimmings	Increasing	Good	Higher
65% Trimmings	Decreasing	Good	Higher
75% Trimmings	Decreasing	Good	Higher
85% Trimmings	Increasing	Short	Higher
90% Trimmings	Decreasing	Short	Higher
90% Imported Beef (frz)	Increasing	Good	Higher
95% Imported Beef (frz)	Decreasing	Good	Higher
Veal Rack (Hotel 7 rib)	Steady	Good	Higher
Veal Top Round (cap off)	Steady	Good	Higher



MARKET TRENDS

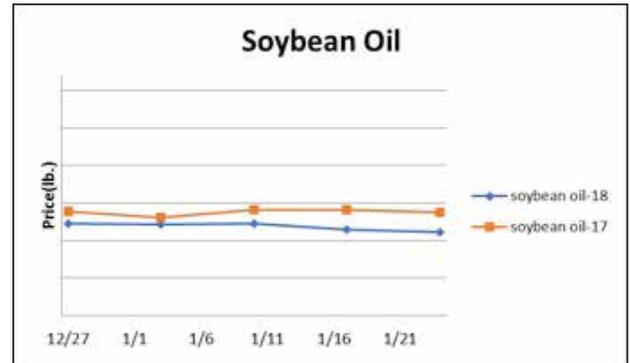
FEBRUARY 2, 2018



Grains

The European Union has instituted limits on palm oil imports from Malaysia and Indonesia due to growing output reportedly coming at a cost of a declining rainforest in the region. This should only encourage soybean oil use further which, along with rising biodiesel demand here, should eventually be supportive of prices.

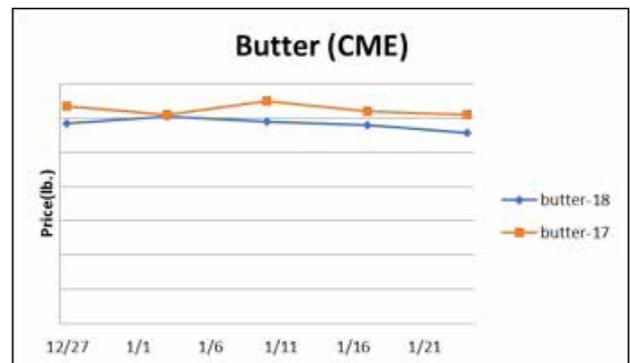
Description	Market Trend	Supplies	Price vs. Last Year
Soybeans, bushel	Increasing	Good	Lower
Crude Soybean Oil, lb	Decreasing	Good	Lower
Soybean Meal, ton	Increasing	Good	Lower
Corn, bushel	Increasing	Good	Lower
Crude Corn Oil, lb	Steady	Good	Lower
High Fructose Corn Syrup	Increasing	Good	Lower
Distillers Grain, Dry	Increasing	Good	Higher
Crude Palm Oil, lb BMD	Decreasing	Good	Lower
HRW Wheat, bushel	Increasing	Good	Higher
DNS Wheat 14%, bushel	Decreasing	Good	Higher
Durum Wheat, bushel	Decreasing	Short	Higher
Pinto Beans, lb	Steady	Good	Lower
Black Beans, lb	Steady	Good	Lower
Rice, Long Grain, lb	Steady	Good	Higher



Dairy

Drought in the largest dairy exporting country, New Zealand, has tightened milk production and dairy supplies. New Zealand milk output during December was 2.3% less than the prior year. This has brought some support to the international and U.S. dairy markets. However, weather conditions have improved in New Zealand, and milk output in the largest dairy exporting region, Europe, continues to expand. Adequate world dairy supplies are projected into the spring which could weigh on U.S. cheese and butter prices. But the greater risk in cheese prices is to the upside.

Description	Market Trend	Supplies	Price vs. Last Year
Cheese Barrels (CME)	Increasing	Good	Lower
Cheese Blocks (CME)	Increasing	Good	Lower
American Cheese	Increasing	Good	Lower
Cheddar Cheese (40 lb)	Increasing	Good	Lower
Mozzarella Cheese	Increasing	Good	Lower
Provolone Cheese	Steady	Good	Same
Parmesan Cheese	Increasing	Good	Lower
Butter (CME)	Decreasing	Good	Lower
Nonfat Dry Milk	Increasing	Ample	Lower
Whey, Dry	Decreasing	Good	Lower
Class 1 Base	Decreasing	Good	Lower
Class II Cream, heavy	Decreasing	Good	Lower
Class III Milk (CME)	Increasing	Good	Lower
Class IV Milk (CME)	Increasing	Good	Lower



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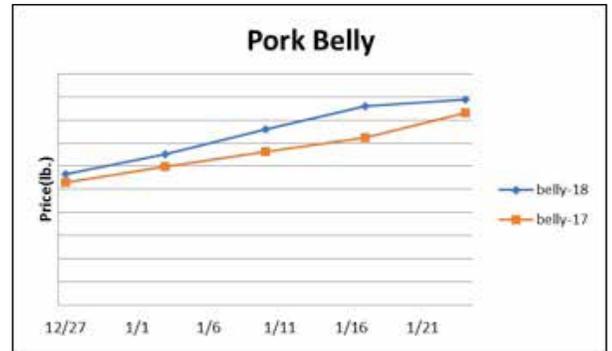
FEBRUARY 2, 2018



Pork

Last week pork production was down 4.5% but .3% better than the same week a year ago. The USDA is forecasting 2018 pork output to be 5.4% better than 2017. This should be adequate to meet U.S. and abroad pork demand. November U.S. pork exports rose 5.1% from 2016 and were a record high. Bacon demand remains strong as well, but better inventories are in place this year. Typically, the belly market peaks soon. Since 2013, the average pork belly price in March was 2.1% lower than the average price in February.

Description	Market Trend	Supplies	Price vs. Last Year
Live Hogs	Decreasing	Ample	Higher
Sow	Increasing	Ample	Higher
Belly (bacon)	Increasing	Good	Lower
Sparerib(4.25 lb & down)	Decreasing	Good	Higher
Ham (20-23 lb)	Increasing	Good	Higher
Ham (23-27 lb)	Increasing	Good	Higher
Loin (bone in)	Increasing	Good	Lower
Babyback Rib (1.75 lb & up)	Decreasing	Good	Lower
Tenderloin (1.25 lb)	Decreasing	Good	Lower
Boston Butt, untrmd (4-8 lb)	Decreasing	Good	Higher
Picnic, untrmd	Increasing	Good	Higher
SS Picnic, smoker trm box	Increasing	Good	Higher
42% Trimmings	Decreasing	Good	Higher
72% Trimmings	Increasing	Good	Higher



MARKET TRENDS

FEBRUARY 2, 2018

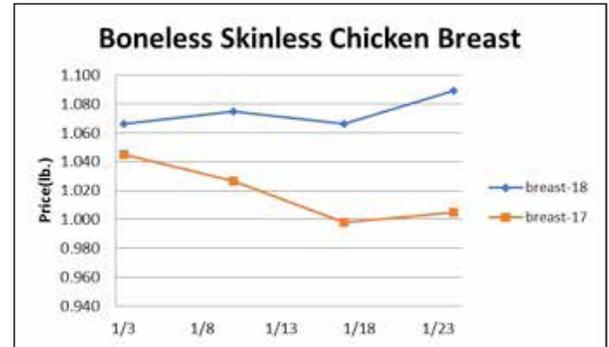
PERFORMANCE
FOODSERVICE



Poultry

Chicken production for the week ending January 13th was 1.7% larger than last year. The six-week total of chicken output was .6% better than a year ago. Chick placements over the last six weeks are tracking 2.5 more than the prior year which hints that year-over-year gains in chicken output near 2.6% can occur in Q2. Last week, the ARA chicken breast index was the highest since October but the second cheapest for the week since 2006. Chicken breast prices usually rise in the coming months. The ARA chicken tender index last week was the highest since September and the costliest for the week since 2012. Chicken tender prices typically move higher during this time of year. The chicken wing markets are likely to seasonally peak soon.

Description	Market Trend	Supplies	Price vs. Last Year
Whole Birds WOG-Nat	Decreasing	Good	Higher
Wings (jumbo cut)	Increasing	Good	Lower
Wing Index (ARA)	Increasing	Good	Lower
Breast, Bnless Skinless NE	Increasing	Good	Higher
Breast, Bnless Skinless SE	Increasing	Good	Higher
Breast Boneless Index (ARA)	Increasing	Good	Higher
Tenderloin Index (ARA)	Increasing	Good	Higher
Legs (whole)	Decreasing	Good	Higher
Leg Quarter Index (ARA)	Decreasing	Good	Higher
Thighs, Bone In	Decreasing	Good	Higher
Thighs, Boneless	Increasing	Good	Higher



Description	Market Trend	Supplies	Price vs. Last Year
Whole Turkey (8-16 lb)	Increasing	Good	Lower
Turkey Breast, Bnls/Sknl	Decreasing	Good	Lower

Eggs

Description	Market Trend	Supplies	Price vs. Last Year
Large Eggs (dozen)	Increasing	Short	Higher
Medium Eggs (dozen)	Increasing	Short	Higher
Liquid Whole Eggs	Decreasing	Short	Higher
Liquid Egg Whites	Steady	Short	Higher
Liquid Egg Yolks	Decreasing	Short	Higher
Egg Breaker Stock Central	Increasing	Short	Higher



MARKET TRENDS

FEBRUARY 2, 2018

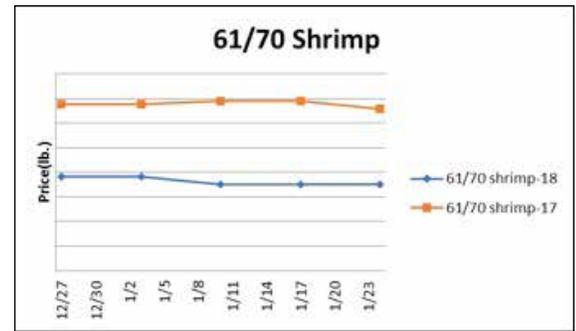
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Seafood

The shrimp markets continue to trade near year ago levels due to solid demand and strong U.S. imports. During November, the U.S. imported 5.6% more shrimp than the previous year marking the biggest total for the month since at least 2010. Recent declines in the U.S. dollar could temper shrimp imports this winter which should support prices.

Description	Market Trend	Supplies	Price vs. Last Year
Shrimp (16/20 frz)	Steady	Good	Higher
Shrimp (61/70 frz)	Steady	Good	Lower
Shrimp Tiger (26/30 frz)	Steady	Good	Lower
Snow Crab, frz	Steady	Good	Higher
Tilapia Filet, frz	Steady	Good	Lower
Cod Filet, frz	Steady	Good	Higher
Tuna Yellowfin, frsh	Steady	Good	Higher
Salmon Atlantic Filet, frsh	Steady	Good	Lower
Pollock Filet, Alaska, frz	Steady	Good	Lower



MARKET TRENDS

FEBRUARY 2, 2018

PERFORMANCE
FOODSERVICE



Paper and Plastic Products

Description	Market Trend	Supplies	Price vs. Last Year
WOOD PULP (PAPER)			
NBSK- Paper napkin	Steady	Good	Higher
42 lb. Linerboard-corrugated box	Steady	Good	Higher
PLASTIC RESINS (PLASTIC, FOAM)			
PS-CHH-utensils, cups, to-go cont.	Steady	Good	Higher
PP-HIGP-heavy grade utensils	Steady	Good	Higher
PE-LLD-can liners, film, bags	Steady	Good	Higher

Retail Price Change from Prior Month

Description	Dec '17	Nov '17	Oct '17
Beef and Veal	Increasing	Increasing	Decreasing
Dairy	Decreasing	Decreasing	Increasing
Pork	Decreasing	Decreasing	Decreasing
Chicken	Decreasing	Decreasing	Increasing
Fresh Fish and Seafood	Increasing	Increasing	Decreasing
Fresh Fruits and Vegetables	Decreasing	Decreasing	Increasing

Various Markets

Orange juice prices have firmed during the last few weeks but remain well below the post Hurricane Irma highs. A multi-decade small crop in the U.S. is being partially offset with bigger supplies out of Brazil. The upside may be limited in orange juice prices this winter.

Description	Market Trend	Supplies	Price vs. Last Year
Whole Peeled, Stand (6/10)	Steady	Good	Higher
Tomato Paste-Industrial (lb)	Steady	Good	Higher
Coffee lb ICE	Increasing	Good	Lower
Sugar lb ICE	Decreasing	Ample	Lower
Cocoa mt ICE	Decreasing	Short	Lower
Orange Juice lb ICE	Increasing	Good	Lower
Honey (clover) lb	Decreasing	Good	Higher



MARKET TRENDS

FEBRUARY 2, 2018

PERFORMANCE
FOODSERVICE



Produce

The large tomato market has fallen to its lowest level since July-down 71% from the peak made just last month. Tomato supplies from Florida are improving. Last week tomato shipments from the state jumped 37% and were virtually even with the same week last year. Tomato prices are likely to find support in the coming weeks and haven't been significantly below the existing levels in nine months. U.S. avocado imports from Mexico last week were 14% less than the same week in 2017. Lettuce, romaine and leaf items are steady and quality has improved. Lemons and oranges are in a very extreme market. Strawberry and raspberry supplies have improved.

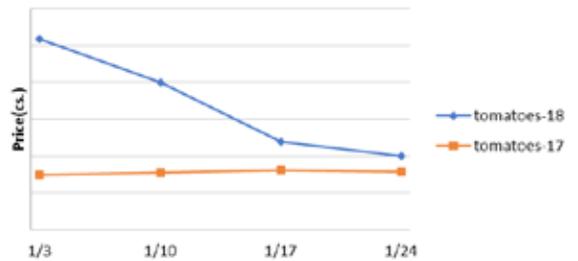
Watch List

Bananas And Pineapples: Several weeks of cooler temperatures have impacted the growing areas in Guatemala and Mexico. In addition, we have seen major flooding in Costa Rica which has not only caused major flooding and delayed harvesting, but has also affected infrastructure delaying shipments. Our growers are seeing lower yields, quality, and volumes. We will be watching day to day as shortages can come along any time.

MARKET ALERT

- Lemons - EXTREME
- Mushrooms - ESCALATED
- Oranges (Small sizes) - EXTREME

Tomatoes (Large)



MARKET TRENDS

FEBRUARY 2, 2018

PERFORMANCE
FOODSERVICE



Produce

Apples & Pears

Prices are unchanged. Storage supplies are plentiful. Peak sizes include: Fuji (88- to 100-count), Gala (100- to 133-count), Golden Delicious (100- to 113-count), Granny Smith (113- to 138-count), and Red Delicious (80- to 113-count). Quality is very good: sugar levels range from 14 to 18 Brix. Pear prices are steady; storage supplies are plentiful, especially 100- to 120-count sizes. Bartlett stocks will be depleted by next week; several growers have already ended their seasons. Sugar levels range from 12 to 14 Brix.

Artichokes

Steady market with higher prices. Quality is good.

Arugula

Product is available and quality is good.

Asparagus

Supplies are better and prices have improved. Quality is good.

Avocados

Overall volume will remain consistent; however, smaller sized fruit is still a challenge over the next several weeks. We will also see production out of California begin to ramp up. There is also the potential for a flush of #2 fruit on the horizon just in time for Super Bowl demand.

Beans

East: Little supply is available from FL as the crop tries to recover from recent cold snaps. As weather warms, this is expected to improve over the next few weeks. FOBs are still very high with mostly good quality.

West: Good volume is expected for only another 7-10 days as supply tightens up. FOBs have started increasing already. Quality is great.

Berries:

Blueberries

Availability is good, quality is fair.

Blackberries

Volume is good, quality has improved.

Raspberries

Volume has improved and quality is good.

Strawberries

The market has improved, we are seeing better prices. Quality is good to fair.

Bok Choy

Quality is average and we are seeing some higher quotes on WGA cartons.

Broccoli / Broccoli Florets

Supplies are good, quality is very good, and the market is down.

Brussels Sprouts

Markets are improving as additional inventory becomes available. Quality is good.

Cantaloupe

We are seeing decent volumes of offshore fruit arriving on both coasts., with fair demand fruit is on the large side mostly 9's and very few 12's and 15's. The overall quality of the offshore fruit looks good with a green to cream cast and very good internal color and descent sugars. We will be in the offshore fruit through April until we start back in the desert around the first of May.

Carrots

We are seeing both good quality and volume.

Cauliflower

Supplies are great and quality is excellent with a wide range of pricing.

Celery

This market is fair. Due to the recent rains, we are seeing product breakdown quickly creating some quality issues.



MARKET TRENDS

FEBRUARY 2, 2018

PERFORMANCE
FOODSERVICE



Produce *(continued)*

Cilantro

Supplies are good and quality is improving.

Corn

Sweet corn markets are down this week due to lower demand out of South Florida; we are seeing some availability crossing through Nogales. Quality is good.

Cucumbers

East: Import volume from Honduras is increasing putting downward pressure on FOBs. Quality is mostly good, but there have been some containers with noticeable weaker quality.

West: Steady volume and demand for Mexico product is keeping FOBs steady. Quality is mostly good, but there have been scattered reports of shorter than usual shelf life.

English Cucumber

There are excellent supplies crossing through Nogales and McAllen.

Eggplant

East: With temperatures not quite hitting warm enough levels for eggplant to hit their peak growth spurt, supply is still short from Florida. FOBs are still high, but steady. Quality for what is available is very nice.

West: Great supply is coming from MX with great quality reports as well. Prices have slightly fallen as supply improves.

Fennel

Supplies for the week will be good and quality is good.

Garlic

Extreme - We are about 50% done with the 2017 crop. Supplies will remain tight between now and July. Prices remain high.

Ginger

Chinese ginger supplies are steady. Quality is good.

Grapes

There are good volumes of Peruvian arriving on the east coast and good volumes arriving from Chile on both coasts. The Chilean and Peruvian fruit quality is very nice, which is a big change from last year. We are hoping that the imports this year will continue with excellent quality barring any major weather issues. . The Chilean crop is of normal volumes and the weather has been good, so we are expecting a good year.

Green Cabbage

Supplies have tightened and markets have firmed on both coasts, but quality remains good.

Red Cabbage

Quality and sizing have been great with good color. The market is firming.

Green Onions

Prices have come down; quality has improved.

Honeydew

We are seeing some off shore and Mexico fruit here on the west and good volumes on the east as well. The Mexico volumes will be very light until around April, and will be dependent on offshore through April. The first fruit is a bit green but cuts nice and sugars are descent, We will start to see better volumes in the next few weeks, but right now fruit is on the tighter side especially on the 6's and 8's fruit is mostly 5' and 4's. We will also be dependent on the offshore fruit through April, until we start back in the California desert the first of May.

Jicama

Prices are firming up and inventories are lighter. We are seeing some quality and shelf life issues in storage product.

Kale (Green)

Quality is improving. Supplies are good.

Kiwi

California crops are now in full swing with ample supply available and showing excellent quality. This new crop will extend all the way through to February. We are now seeing Italian fruit available as well on the east coast. Market remains steady.



MARKET TRENDS

FEBRUARY 2, 2018

PERFORMANCE
FOODSERVICE



Produce (continued)

Lemons

Market very strong with excellent demand and some sizes demand exceeds supply. We are done harvesting in Dist 3 (desert) and going in a good way here in dist 1 (Central Valley), we are gassing fruit so you will see some checker-board color and some spotting, just like the oranges we will hope to see better color break here in Dist. 1 as our nighttime temperatures cool down which will promote better color break and allow for less gassing hours. There has been some clear rot showing up which is caused by the warmer days and moisture in the ground due to the rains and the morning fog. The overall crop size out of dist 3 is about 20% lighter than last year and here in Dist. 1 about 15% lighter. We expect the market to stay fairly strong with lighter volumes out of both districts and with domestic and export demand very good.

Lettuce:

Butter

Prices are stable. Quality is good.

Green and Red Leaf

Quality is good. Prices are good.

Iceberg Lettuce

Quality is nice and the market is low. Demand is lighter than normal.

Romaine

At this point, supplies exceed demand. Quality is average, and we are still seeing some cupping and occasional blistering.

Romaine Hearts

Supplies are normal and quality is average.



Limes

The market is slightly lower; supplies are ample. Quality is very good: discoloration/yellowing is an occasional issue.

Napa

Supplies are steady and quality is good in the west. Supplies in the east are tighter due to the cooler weather that has hit the growing regions in North Florida and South Georgia this month.

Onions

What was once believed to be a very short crop in the Northwest, has been extended quite a bit due to lack of available trucks and railcars. We are currently seeing supplies meet demand and a steady market on yellow onions. There has been some downward pressure in recent weeks, and Northwest growers seem to have an imbalance of reds to yellows so there are plenty of straight load deals available out of both Idaho/Oregon and Washington. We are beginning to see supplies on Mexican yellow onions trickle in through South Texas as well. We are currently seeing the size profile heavy to mediums right now, with very little volume on Colossal and Supers available. The outlook on the Mexican and Texas crop is that, barring unexpected weather, they had a good growing season with good quality and yields expected. A lot can certainly still change, but as of this writing, we do expect there to be less of a transitional gap than years past which will help keep pricing in check.

Oranges

Market is very strong with excellent demand across the board the 113's and 138's are demand exceeds supply. We are in full swing on our California navels and the overall quality is looking good with sugars are still around 11-15 and acid levels are minimal, so fruit is eating good. We are done gassing fruit as we have had several cold nights in the high 20's which really helped bring on color and firm up the fruit. Our forecast is for rain Thursday and clear for the next 10 days so we should be back in picking by Saturday or Monday we do not anticipate any shortage of fruit to pack only short on the smaller fruit for the rest of the season. The overall crop is about 15-20% lighter than normal, therefore smaller fruit will continue to stay very tight going forward. Most blocks right now are peaking on 72's followed by 56's.

Parsley

(Curly, Italian) Quality is improving and supplies are good.

MARKET TRENDS

FEBRUARY 2, 2018

PERFORMANCE
FOODSERVICE



Produce (continued)

Green Bell Pepper

East: Florida is moving into more moderate volumes versus previous light supply. Crops are on the edge of reaching higher production levels once weather warms up. Big sizes are more readily available with choice being a little snug, however, still good supply. Thus, FOBs on Jumbo/XL & LG sizes are down while choice grade remains about steady. Quality is great.

West: All growers in Sinaloa & Sonora are pumping great volume to the market. All sizes are readily available with excellent quality reports.

Jalapeño Peppers

East: supply is still very minuscule from FL with Plant City's crop wiped out due to the freeze. FOBs are relatively steady. The bright side is quality is great.

West: The two heavy hitters, Sonora & Sinaloa, are both pumping great supplies and quality out. Prices remain low with promotable volume available.

Red & Yellow Bell Pepper

The Mexican market has dipped; prices in Florida are a bit higher due to cold weather. Quality ranges from good to very good: discoloration, odd shape, and scarring are occasional problems.

Pineapples

The market is stable; stocks are ample. Quality is good: fruit is juicy and tangy, yet sweet. Sugar levels vary from 13 to 16 Brix.

Idaho Potatoes

Both planting acreage and yields were off in Idaho this past growing season, and we still expect a strong finish as growers finish shipping their Norkotah storages in the next few months, and we are exclusively into Burbanks. The season started off with profiles heavy to large size count cartons, and 80ct and smaller were very tight. As of late, we are beginning to see the size profile turn a bit and larger size cartons are beginning to command a premium, while the smaller size potatoes are coming off in price. Similar to the onions, lack of railcars and trucks should help to extend supplies on hand and keep a ceiling on pricing. Growers will begin planting in April for next season's crop.

Rapini

Supplies have improved and markets are down. Quality has improved.

Radishes

Quality is good and supply is slowing down. Expect to see stronger markets through the summer.

Salad Blends

The market is unchanged; supplies are abundant. Quality is good. Inspectors are monitoring core material/seeder and internal burn problems in order to pack the finest product on the market.

Snow and Sugar Snap Peas

Snow and sugar snap peas supplies are improving through Miami.

Spinach (Bunched):

Supplies are available and quality has improved.

Spinach (Baby)

Baby and clipped spinach supplies are good. We are seeing improvement in quality.

Spring Mix

Supplies and quality are good.

Yellow Squash / Zucchini

East: Production is still light but improving. Demand has been fairly light which has helped keep an acceptable level of supply in the marketplace. FOBs are falling quickly as supply improves. However, quality is still only fair to good. Yellow is still showing heavy scarring while green is showing light scarring.

West: Great volume is available with increasing supply as more growers come on board. However, there are still major



MARKET TRENDS

FEBRUARY 2, 2018

PERFORMANCE
FOODSERVICE



Produce *(continued)*

quality issues, especially on yellow. Therefore, there is still a spread on pricing. Better quality is demanding a much higher price point.

Tomatoes

East

Rounds

Strong production levels continue to pump from our Florida farms. Sizing is shaping up nicely across the board. FOBs have fallen once again as volume increases. Quality is excellent and expected to remain in great condition with ideal growing conditions.

Romas

While romas still trail behind rounds in terms of volume harvested, there is still ample supply available from our Florida farms. Growing conditions have been excellent, helping increase supply and putting further downward pressure on pricing. FOBs falling across the board with superb availability on all sizes. Quality is excellent.

Grapes

Plentiful supply levels are available from South Florida and are forecasting strong levels moving into next week. FOBs are down on both bulk and pints. Quality is excellent.

Cherries

Supply has leveled out with steady demand. FOBs are stagnant with excellent quality available for purchase.

West/Mexico

Rounds

Western MX is the primary player, moving strong supply out of their fields. Crops are reaching peak production levels with excellent size options available. Baja & Eastern MX are still harvesting a limited amount of volume as their season winds down. Good growing conditions have helped them stick around longer, however, their crop will come to a close in the next few weeks. FOBs have fallen to almost the minimum trading value. Quality from all areas is great.

Romas

Great volume is moving across the borders from Western

MX as growers and crops reach their peak production levels. Baja & Eastern MX have limited supply as well. FOBs are mostly trading at or around the minimum suspension agreement with excellent quality.

Grapes

Plentiful supply levels are available from MX and expected to remain in great volumes so long as growing conditions remain optimal. FOBs are trading at or close to the minimum suspension agreement with excellent quality.

Cherries

Similar to all other tomatoes, superb growing conditions are keeping supply plentiful. Balanced with a healthy demand, FOBs remain low with excellent quality.

Watermelons

The market is steady; volume is average. Quality is good: slight issues include under-ripeness, thick green/white rinds, and light-colored flesh. Sugar levels range from 7 to 12 Brix.

